

LifePlaybooks™

Team Ways of Working

M365 PLAYBOOK

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The frameworks, prompts, and suggestions included here are guidance, not fixed rules. Use your own judgment as the team or project lead when adapting them to your team’s structure, tools, and context.

By using this Playbook, you acknowledge responsibility for the working norms your team adopts and how they are implemented.

Introduction

Deadlines are tighter. Budgets are leaner. Expectations are higher. AI is everywhere, hybrid work is the norm, and somehow, you're expected to keep everyone aligned while Microsoft 365 keeps evolving.

The result? Tools are used differently, information is scattered, and your best people are burning out from digital noise.

The Team Ways of Working Playbook gives you a simple, repeatable way to cut through that noise. In three steps, gather team input, build the Playbook, and share it with your team, you replace scattered habits with shared ways of working around clarity, alignment, rhythm, visibility, respect, and AI use.

Busy project managers, first-time PMs, and team leads alike can stop reinventing “how we work” on every project or initiative and get everyone on the same page in under an hour.

Overall Instructions: Team Ways of Working

Step 1: Gather Team Input

Share the [“How We Work” questionnaire](#) to capture team preferences, comfort levels, and constraints. This input provides insight, not votes, and will help you design the Playbook.

Step 2: Build the Playbook

Upload the survey export and the Playbook template into Copilot. Copilot will synthesize the team's input into a neutral, first-draft Playbook that reflects patterns in the data.

The draft can then be reviewed, refined, and approved as the final version.

Outcome

A short, practical Playbook that aligns the team on communication, meetings, file storage, task tracking, and AI usage.

- Built from aggregated team input
 - Synthesized neutrally by Copilot
 - Finalized, if required, through leader review and approval
-

Sample Script for Introducing the Process (New Teams/Projects)

As we start this new project, it's important that we get aligned on how we'll work together from day one. To support that, we'll create a short Team Ways of Working Playbook; a simple guide that outlines how we communicate, store files, run meetings, track work, and use AI tools like Copilot.

Step 1: Your Input

You'll complete a short questionnaire about your preferences, comfort levels with Microsoft 365 tools, and past experiences, what's helped you work well, and what's created friction in the past. Your feedback will give us the insight we need to start this project with clarity and momentum.

Step 2: The Playbook

After the questionnaire is complete, Copilot will synthesize our team's responses into a first-draft Playbook. This gives us a neutral, pattern-based view of how we work best as a team. We'll then review, refine, and finalize it together. The final Playbook will be a clear, practical reference point organized around clarity, alignment, rhythm, visibility, respect, and how we use AI as a team, helping us start strong, stay aligned, and focus our energy where it matters most.

Sample Script for Introducing the Process (Existing Teams)

Our team already has great momentum, but as tools, projects, and expectations continue to evolve, we're going to create a short Team Ways of Working Playbook to help us stay aligned day-to-day. This Playbook will capture how we communicate, store files, run meetings, track work, and use AI tools like Copilot.

Step 1: Your Input

You'll complete a short questionnaire about your preferences, comfort levels with Microsoft 365 tools, and past experiences, what's worked well, what hasn't. Your feedback will help us understand where we can refine how we work together and reduce friction.

Step 2: The Playbook

Once the questionnaire is complete, Copilot will synthesize our team's responses into a first-draft Playbook. This gives us a neutral, pattern-based starting point that reflects what the team actually shared. We'll then review and finalize it together. The result will be a clear, practical guide organized around clarity, alignment, rhythm, visibility, respect, and how we use AI as a team, helping us spend less time navigating tools and more time delivering meaningful results.

STEP 1 Gather Team Input

Instructions for PMs or Team Leads – “How We Work” Input Questionnaire

Purpose

The Team Ways of Working Questionnaire is designed to capture team preferences, comfort levels, and potential friction points when using Microsoft 365 tools. This input helps reveal how people actually work, so the Playbook can be created with clarity, accuracy, and confidence, without trial and error.

How to use this template

1. **Copy and duplicate the Microsoft Form:** [How We Work Questionnaire – Copy form](#)
A ready-made Microsoft Forms version of the questionnaire has been created. Copy it into your environment and duplicate it before sharing.
2. **Review and edit if needed.** You’re welcome to make edits to ensure the questions fit your team’s context.
Note: *Edits are completely allowed, just be mindful that significant changes to the wording or structure of the questions may affect how cleanly Copilot can interpret the responses. The closer the format stays to the original version, the more structured and accurate the Copilot-generated Playbook will be.*
3. **Set the expectation.** Let the team know this is about gathering insight, not voting on decisions. The feedback informs the Playbook, but final norms will be set by the project lead.
4. **Encourage thoughtful responses.** Honest input about tool comfort, frustrations, and working preferences will improve the quality of the Copilot synthesis.
5. **Set a clear deadline.** A 3–5 day window usually works well and keeps momentum for moving into Playbook creation.

What you’ll get from the responses

- A snapshot of Microsoft 365 readiness (Teams, SharePoint, Planner, Copilot)
- Insights into communication preferences and meeting cadence
- Awareness of constraints (time zones, work patterns, working styles)
- Clarity on where AI feels helpful — and where it doesn’t

Script: Team Instructions – Detailed

Use or adapt the script below for your email or Teams message to the team.

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Hi [NAME(S)]

We're creating a Team Ways of Working Playbook to help us collaborate more smoothly and stay aligned. Your input gives Copilot the insight it needs to build an accurate first draft.

### **What to do**

**1. Complete the short questionnaire (10–15 minutes):**

[INSERT FORM LINK]

**2. What it asks:**

- Microsoft 365 comfort
- Communication and meeting preferences
- File storage and task tracking habits
- Working styles
- Comfort with AI tools like Copilot

**3. Optional:** “About Me” section, share what you like, or skip it.

### **What happens next**

- Copilot will generate the first draft of our Playbook based on everyone's responses.
- The final Playbook will be a simple, practical guide for how we work together.

### **What we need from you**

Be honest and specific. Share what works, what doesn't, and where clarity helps. Your input directly improves the quality of the Playbook.

## Summary of the “How We Work” Input Questionnaire

### [How We Work Questionnaire – Copy form](#)

To create this Playbook, each team member completes a short survey about how they prefer to collaborate day-to-day. The questionnaire focused on practical areas that influence team alignment and ease of working together:

#### **1. M365 Skill & Comfort**

Understanding familiarity with Teams, SharePoint, and task tools so we can set clear expectations and choose tools everyone can use confidently.

#### **2. Communication Preferences**

Identifying how people stay aligned, handle urgent items, prefer async vs. sync updates, and feel about @mentions or decision-sharing.

#### **3. Meetings & Syncs**

Gathering input on effective meeting practices, ideal cadence, and any constraints that should be considered when scheduling.

#### **4. File Storage & Document Work**

Clarifying co-authoring preferences and preferred locations for file storage to keep documents easy to find and consistently maintained.

#### **5. Task & Work Tracking**

Learning how visible work should be, which task tools people know, and which tracking methods support clarity and momentum.

#### **6. General Ways of Working**

Understanding what helps or hinders collaboration including expectations, focus time, tool habits, and common frustrations to avoid.

#### **7. Copilot & AI Use**

Capturing comfort levels, appropriate use cases, and boundaries around AI so the team can use Copilot safely and effectively.

#### **8. About Me (Optional)**

Optional context such as role, time zone, or personal working preferences that may support smoother collaboration.

# STEP 2 Build the Playbook

## Instructions for PMs or Team Leads – Team Ways of Working Playbook

### Purpose

The Team Ways of Working Playbook turns your team's input into clear, leader-approved norms for how you'll work together. It ensures clarity, consistency, and alignment across tools, meetings, and collaboration habits, saving you hours of trial and error.

### Why these six sections?

The Playbook is organized around the People-First Project Pillars. Each pillar anchors a critical aspect of team success:

- ✦ **Clarity** → Goals, roles, expectations, sources of truth
- ✦ **Alignment** → Priorities and decisions move in the same direction
- ✦ **Rhythm** → Predictable cadences and rituals reduce chaos
- ✦ **Visibility** → Transparent work, blockers, and progress
- ✦ **Respect** → Time, focus, and working styles are honored
-  **AI & Copilot** → Clear guidance on where AI helps and where humans lead

Together, these ensure your Playbook is not a list of rules, it's a **balanced system** that supports performance and trust.

### What you'll produce

A practical guide (Playbook) that cuts through tool overload and reduces friction, so your team can focus on delivering results. The Playbook documents:

- How tasks are tracked and files are stored
- How updates, decisions, and blockers are shared
- How meetings and check-ins are run
- How the team will use (and not use) AI tools like Copilot

*Note: Before uploading survey responses to Copilot, follow your organization's policies for AI, privacy, confidential information, and employee data. Remove any information that should not be processed through your organization's approved AI tools.*

## How to create the Playbook

### Step 1 Export the survey results

1. Open the Microsoft Form
2. Select **Responses** → **Open in Excel**
3. Save the Excel file locally

### Step 2 Open Copilot

Use Copilot in the web or desktop experience and start a new chat.

### Step 3 Upload the required files

Drag and drop into Copilot:

- **The Excel export** of the team's survey responses
- **The Team Ways of Working Playbook template** (Word document)

### Step 4 Paste this prompt into Copilot

#### ★ AI Prompt (copy/paste):

Here are: (1) the team's responses to the 'How We Work' questionnaire (Excel file), and (2) the Team Ways of Working Playbook template (Word file).

Please review the survey results and generate a complete first draft of the Playbook using the template structure.

For each of the six sections, Clarity, Alignment, Rhythm, Visibility, Respect, and AI & Copilot, do the following:

- Summarize patterns in the team's responses
- Convert those patterns into clear, practical working norms
- Write the content directly into the correct sections of the template
- Keep the tone simple, neutral, and aligned to how modern teams use Microsoft 365 tools

Once complete, provide the full Playbook text so it can be copied back into the template. Do not invent new sections, follow the template exactly.

## **Step 5 Let Copilot generate the first draft**

Copilot will:

- Analyze all survey responses
- Identify meaningful patterns
- Populate each of the six pillars
- Produce a neutral, structured Playbook draft grounded in the submitted responses

## **Step 6 Review and finalize**

The team lead or PM reviews the AI-generated draft and makes any small edits needed to reflect:

- Leadership expectations
- Project realities
- Boundaries or clarifications

The goal is light editing. The structure and insights are already taken care of by Copilot.

## **Step 7 Format and publish**

Before sharing with the team:

- Edit for clarity and consistency
- Remove placeholder text
- Format for readability
- Save as the final Team Ways of Working Playbook in your team SharePoint

## Optional AI Bridge

If you'd like extra clarity, refinement, or insight after Copilot generates the first draft, these optional one-line prompts can help. They're designed to validate the draft, strengthen the wording, and support your leadership voice without adding complexity.

### Understanding the Team's Input

- "Summarize the top insights from the survey in 5 bullets."
- "Explain the main patterns you saw in the team's responses."
- "Show me which responses influenced each section of the Playbook."
- "Highlight anything unexpected in the data."

### Validating the Draft

- "Check this Playbook for gaps or assumptions I should revisit."
- "Flag anything in this draft that could cause friction for the team."
- "Which decisions in this Playbook may need leader confirmation?"
- "Identify any misalignment between the survey data and the Playbook."

### Strengthening the Wording

- "Make this Playbook more concise without losing meaning."
- "Rewrite this in a clear, neutral, professional tone."
- "Offer alternative wording for these norms."
- "Simplify this section so it's easier to follow."

### Real-World Application

- "How would these norms support us during a high-intensity project?"
- "Where could this Playbook reduce rework or confusion?"
- "If a new hire read this, what would they take away?"
- "Give me an example of when these norms prevent misalignment."

### **Team Readiness & Support**

- “What training or support might this team need based on their responses?”
- “Where is tool confidence low, and what should we do about it?”
- “Summarize this team’s readiness for AI and Copilot.”

### **Implementation Support**

- “Write a short script to walk the team through this Playbook.”
- “Draft a quick Teams message to introduce the Playbook.”
- “List three risks of not following this Playbook consistently.”

### **Continuous Improvement**

- “Create a 30-day, 60-day, and 90-day Playbook check-in plan.”
- “What signs would indicate the Playbook needs updating?”
- “Draft a short pulse survey to assess how well the Playbook is working.”

### **Optional Transparency (Meta-Prompts)**

- “Explain how you formed each recommendation in this Playbook.”
- “Show me any assumptions you made based on the survey data.”
- “List the specific inputs used to generate each section.”

## STEP 3 Share the Playbook

### Share visibly & reinforce

- Share the Playbook with the team via email or a Teams message.
- Add the link somewhere central and easy to find (Teams tab, OneNote, SharePoint).
- Walk the team through it briefly, in a meeting or an async video.
- Reinforce it by referring back to it during work (“As outlined in our Playbook...”).

### Script – Team Instructions (Detailed)

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Why we’re doing this

Thank you for completing the Step 1 questionnaire. Your input helped Copilot create our Team Ways of Working Playbook, a simple guide that reflects how this team prefers to collaborate and where we may need more clarity or support.

Here is the Playbook: **[Insert link]**

What you can expect

- A short, practical guide (no long rulebook) with the essentials we need to stay aligned
- Clear agreements for how we communicate, store files, run meetings, and track work
- Guidance on where we *will* and *won’t* use AI as a team
- A shared reference point we can return to whenever we need clarity
- Periodic check-ins to ensure the Playbook continues to support our work

What I need from you

Please review the Playbook and use it as our day-to-day guide for how we work together. If something doesn’t work in practice, or if we need to adjust as the project evolves, let me know, the Playbook is designed to evolve with us.

Next Steps & Recommendations for PMs After the Playbook is Complete

1. Embed it into daily work

- Pin or link the Playbook in the main Teams channel.
- Use it to shape meeting setups, agendas, and timeboxing.
- Refer to it when assigning tasks, documenting decisions, or clarifying expectations.
- Reinforce agreed norms when the team slips back into inconsistent habits.

2. Model the behaviours

- Use the tools, practices, and communication channels exactly as outlined.
- Log decisions consistently and follow the meeting rhythms you agreed to.
- Show through your own actions that the Playbook is not optional, it's how the team works.

3. Gather early feedback

- After 2–3 weeks, ask the team:
“What’s working well? What feels unclear or clunky?”
- Make small adjustments quickly, responsiveness builds trust and strengthens adoption.

4. Set a regular review cadence

- Schedule a quarterly reset or align reviews with project milestones.
- Update the Playbook as priorities shift, tools evolve, or team needs change.
- Add a simple “last updated” note so everyone knows it’s current.

5. Keep AI & Copilot visible

- Revisit the AI section as comfort and skills grow.
- Share quick wins or time-savings (e.g., “Copilot summarized our last meeting in minutes”).
- Adjust boundaries and guardrails if risks or discomfort arise.

6. Use it to onboard new team members

- Share the Playbook with new members on day one.
- Save time by not re-explaining norms from scratch.
- Maintain consistency as the team grows or changes.
- If several new members are joining at once, or the team's makeup is shifting significantly, treat it as a trigger for a Playbook refresh (see "Set a review cadence" above) rather than a simple share.

The Playbook is not a one-time document, it's a living guide.

Your role is to keep it visible, model the behaviours, reinforce the norms, and evolve it as the team and tools evolve.

The LifePlaybooks™ Commitment

This Playbook reflects more than a set of working norms, it reflects a way of leading.

At LifePlaybooks™, we believe teams perform at their best when clarity is shared, expectations are explicit, and collaboration is designed with intention.

This Playbook is one small part of a much bigger goal: systems that hold people, so they can do their best work together.

When teams have a shared way of working, they don't just deliver, they thrive.

Stay Connected

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